

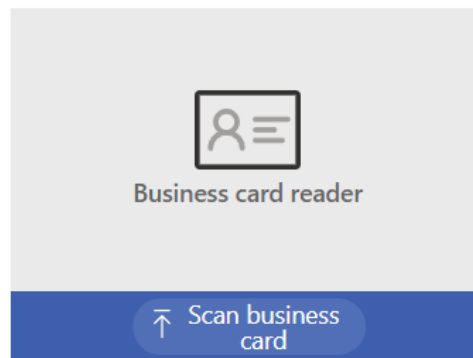
Scan Business Card Feature in Dynamics 365

A little-known feature in the Dynamics 365 Unified Interface that has gone under the radar that some of our clients have started to use recently is the Scan Business Card button. This just needs to be added to the 'Quick Create form for Contacts'. This blog details how to set it up in both different customisation interfaces and the potential permission issues that may be faced by users using the feature.

Quick Create: Contact

DETAILS

Business Card

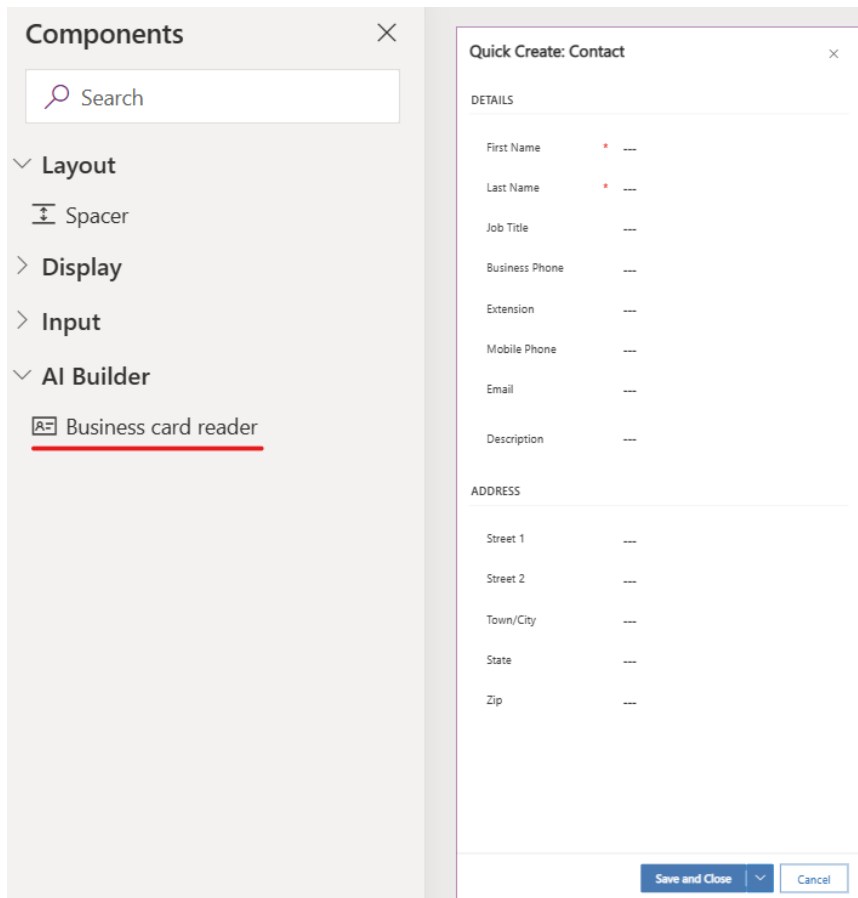


First Name * ---

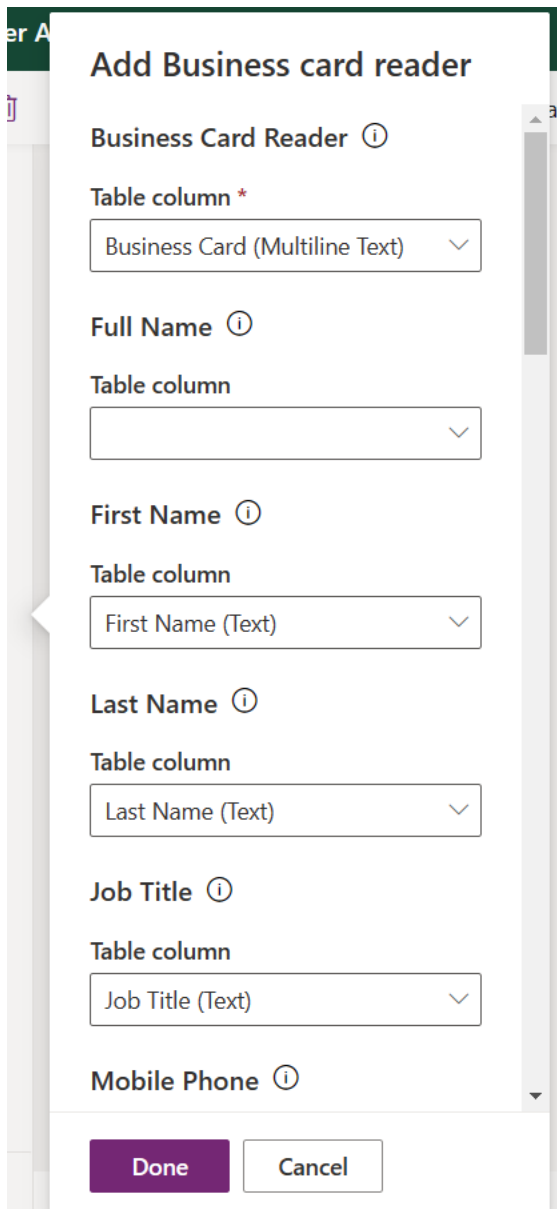
Last Name * ---

To put this feature in place you can use either the 'make.powerapps.com' customisation designer or the classic interface within the customisations area in administration.

In make.powerapps.com, go to the correct form then go into the 'Components' section and choose 'Business card reader' within the 'AI Builder'.



Once selected then go through and map the fields within the form to the appropriate fields in the 'Business card reader'. When everything has been mapped simply click the 'Done' button and save and publish the form.



Add Business card reader

Business Card Reader ⓘ

Table column *

Business Card (Multiline Text) ▾

Full Name ⓘ

Table column

▾

First Name ⓘ

Table column

First Name (Text) ▾

Last Name ⓘ

Table column

Last Name (Text) ▾

Job Title ⓘ

Table column

Job Title (Text) ▾

Mobile Phone ⓘ

▾

Done **Cancel**

If adding the 'Business card reader' using the classic customisation interface. You do this in a slightly different way.

First open the 'Quick create contact form', then from the list of fields, select the 'Business Card' and put it in the desired location on the form. You then need to click into the field properties and go to the 'Controls' tab and select and add the 'AI Builder Business Card control'.



Solution: Default Solution

Form: **Contact**

Tab

DETAILS	EXTRA INFORMATION	ADDRESS
Business Card <input type="text" value="Business Card"/>	Description <input type="text" value="Description"/>	Street 1
First Name * <input type="text" value="First Name"/>		Street 2
Last Name * <input type="text" value="Last Name"/>		Town/City
Job Title <input type="text" value="Job Title"/>		State
Business Phone <input type="text" value="Business Phone"/>		Zip
Extension <input type="text" value="Extension"/>		
Mobile Phone <input type="text" value="Mobile Phone"/>		
Email <input type="text" value="Email"/>		

Field Properties

Modify this field's properties.

Display | Formatting | Details | Events | Business Rules | **Controls**

Add Control

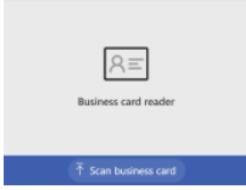
Select a custom control from the field.

- AI Builder Business Card control
- BoundQueryBuilderWrapperControl
- Build expression button
- CC_OCIERAttributeSelectionControl_Name

AI Builder Business Card control

Modes: Edit + Read
Types: SingleLine.Text, Multiple

Use this AI Builder control to automatically extract contact information from images.



[Add](#)

OK Cancel

Then go through and map the 'Business Card Reader' fields to the fields on the form, by clicking on the edit 'pencil' icon.

Field Properties






? X

Modify this field's properties.

Control	Web	Phone	Tablet	
Text Area (default)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
AI Builder Business Card control	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	X

[Add Control...](#)

AI Builder Business Card control

Business Card Reader *	businesscard	
Full Name		
First Name	firstname (SingleLine.Text)	
Last Name	lastname (SingleLine.Text)	
Job Title	jobtitle (SingleLine.Text)	
Mobile Phone	mobilephone (SingleLine.Phone)	

Address State
Compatible types: SingleLine.Text
Extracted Address State

Hide Default Control

OK

Cancel

After the form is saved and published, the button will then be visible on the form.

Potential Permission Issues

However, for users to use the feature certain permissions need to be added to their security role. They are: -

AI Model	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
AI Object Detection Bounding Box	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
AI Object Detection Image	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
AI Object Detection Image Mapping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
AI Object Detection Label	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
AI Template	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

These permissions are in the 'Custom Entities' tab, of the security role.

AI Model – 'Read' with 'User' Scope.

AI Object Detection Image Mapping – 'Read' with 'Organization' Scope.

AI Template – 'Read' with 'Organization' Scope.

If these permissions are not added users may get errors like this: -

Quick Create: Contact ×

Details

Scan Business Card

⊗ It looks like AI Builder wasn't set up correctly. Ask your admin to investigate.

First Name	+	Gary
Last Name	*	---
⊗ Required fields must be filled in.		
Job Title		---

Business Card

